

Missouri Technical Reference Manual

Project Update

April 2016

DELIVERABLES RECORDED BY END OF QUARTER 1:

- Stakeholder Kick-Off Meeting
- Stakeholder Engagement and Meeting Plan
 - Project SharePoint Site
 - Established Oversight Committee and Technical Advisory Committee
- Draft Measure List
- Draft Measure Template

ACCOMPLISHMENTS

During 2016 VEIC successfully launched a statewide collaborative effort alongside the Missouri DED-DE to develop a formal Missouri-wide Technical Reference Manual (TRM) which will provide gas and electric utilities a transparent, consistent set of standard energy efficiency measure characterizations for tracking and documenting energy efficiency savings and cost recovery.

The project kick-off meeting, held on January 22, 2016, in Jefferson City, MO brought together more than 30 key stakeholders and cost-share partners including electric, gas and water utilities from across Missouri represented by Ameren Missouri, Empire District Electric, Kansas City Power & Light, Laclede Gas Company, Summit Natural Gas, Missouri American Water Company and the Missouri Public Utility Alliance. Representatives from the Public Service Commission, Missouri Department of Natural Resources, the Environmental Protection Agency, the Office of Public Counsel, Missouri Energy Initiative, Natural Resources Defense Council, Renew Missouri and the Sierra Club were also joined by US Department of Energy's State Energy Program (SEP) managers, through which the project is funded.

The purpose of the kick-off meeting was to inform and engage the stakeholder group on the TRM work plan, purpose, and to emphasize the importance of a collaborative and transparent approach to building this shared reference document. To ensure a successful project execution, the following key actions were also agreed to at this meeting:

- A clear mechanism and approach to guaranteeing secure information and data sharing among stakeholders; and

- A clear communications plan and strategy for ensuring stakeholder engagement in policy discussions as well as technical review and analysis of materials.

Following this foundational event, VEIC worked closely alongside the Missouri DED-DE identifying key contacts from each cost-share partner to engage in the project's two "working" groups: 1) the Oversight Committee (OC) and, 2) the Technical Advisory Committee (TAC); training all stakeholders on SharePoint and ShareFile—the project's chosen encrypted file sharing, storage and information management system—and; commenced collection of all relevant data from utilities and other stakeholders required for TRM development. By engaging stakeholders from the start in this open and direct fashion, VEIC ensured that the main inputs required for the project's initial analysis were grounded by Missouri-specific data as well as significant amounts of contextual information and the important subtleties related to the relationship between the utilities and the existing regulatory framework in Missouri.

Beginning in March, VEIC commenced discussions with the Oversight Committee (OC) to map out and clarify what the TRM might look like, to outline the way stakeholders may use the TRM, and to identify the processes that will need to be put in place to ensure the ongoing update and maintenance of the document. To facilitate these discussions, members of the OC were presented with a draft measure template, a proposed framework for the TRM document as well as "*sample TRM usage*" language to guide stakeholders' consideration and input into how the Missouri statewide-TRM should be developed to deliver meaningful benefit and value to everyone.

Concurrently, VEIC also engaged members of the Technical Advisory Committee (TAC) in the development of the TRM's uniform measure list. This list maps all currently available prescriptive gas and electric efficiency measures offered in Missouri to a "common" measure name and is built upon the analysis and review of all utility and other stakeholders' data, protocols and calculations previously received. An initial draft list was completed for internal distribution and review by the TAC toward the end of March. VEIC has subsequently worked alongside the TAC on several iterations of the list and formally put forward a draft to the Oversight Committee at the end of the quarter for their consideration. This list, once finalized, will be used to inform the "table of contents" of the TRM and will be the basis on which all measure characterizations will occur.

